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Tobacco

World Tobacco Situation

FT-11-86
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47

Summary.....2

World Developments Affecting Tobacco Demand
Hong Kong Proposes Ban on Smokeless Tobacco.....3
New Malaysian Budget Proposes Increased Cigarette Sales Taxes.....3
Saudi Arabia Sets Strict Standards For Tobacco Products.....3
Turkey Increases Prices for Tobacco Products.....4

World Developments Affecting Tobacco Supply
Turkey Announces Minimum Export Prices for Oriental Tobacco.....4
Bulgarian Exports Expected To Fall.....5
Ontario Flue-Cured Auction Opens.....5
Greek Tobacco Exports Down.....5
Malawi Auction Market Closed.....5
Turkey Announces Producer Support Prices.....6
Zimbabwe Auction Market Closed.....6

U.S. Tobacco Developments
1986/87 New-Crop Price Supports Announced.....7
1986 Burley Market To Open.....8
Export Forecast Revisal.....8
Public Comment Requested on Flue-Cured Tobacco Situation.....8
Flue-Cured Auction Report.....8
Trade Summary.....9

Special Section
Chinese Tobacco Situation.....21

Approved by the World Agricultural Outlook Board - USDA

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SUMMARY

The 1986 unmanufactured tobacco export forecast has been adjusted downward from 250,000 metric tons to 225,000 tons to reflect changing trade practices within the industry. This is due to the increased use by exporters of the semi-processed customs categories "smoking tobacco in bulk" and "smoking tobacco, not elsewhere classified (NEC)" which have risen 333 percent and 48 percent, respectively, in volume.

U.S. unmanufactured tobacco exports during September 1986 were 10,317 tons, valued at $59.6 million, down 46 percent in volume and 47 percent in value from September 1985. The drastic decrease is attributed to lower exports in a number of major leaf markets. Flue-cured exports showed a similar trend with September 1986 exports of 5,607 tons valued at $34.4 million, down 56 percent in volume and 55 percent in value from September 1985. Burley tobacco exports were 1,227 tons in September, valued at $7.3 million. September 1986 exports were about 50 percent the volume of a year ago. Cigarette exports totaled 5.3 billion pieces compared with 5.5 billion pieces in September 1985. Exports of smoking tobacco in bulk rose to 2,798 tons from a much lower figure of 276 tons a year ago while smoking tobacco, not elsewhere classified, fell 93 percent to 100 tons in September 1986.

On the other hand, unmanufactured tobacco imports for consumption (duty paid) during September 1986 totaled 18,017 tons valued at $52 million, up 17 percent in volume from 1985. General imports (actual arrivals) of unmanufactured tobacco during September 1986 totaled 11,384 tons, valued at $29.8 million a decrease of 32 percent in volume and an 18-percent decrease in value.

Bulgaria's 1986 tobacco exports are expected to fall to 56,000 tons, down 10 percent from the 62,000 ton level of 1985. A smaller 1985 leaf crop accounts for the lower shipment level.

Canada's 1986 flue-cured market has opened with prices slightly below last year.

China remains the leading producer of leaf tobacco with a 1986 forecast of 2.145 million tons compared to U.S. production of 540,000 tons. Flue-cured tobacco makes up about 90 percent of total production. Most tobacco produced is used domestically with very little exported. China is also the largest producer and consumer of cigarettes with a 1986 production forecast of 1.27 trillion pieces.

Greek tobacco exports during the January-August 1986 period totaled 57,484 tons, valued at $141 million, down 6.7 percent in volume and up 18.4 percent in value from a year ago.

The Hong Kong Government recently banned local sales of smokeless tobacco. U.S. exports of these products to Hong Kong totaled $16,000 during 1985.

The Malawi tobacco markets closed on October 9, 1986, after 26 weeks of sales. Total sales of 63,540 tons valued at $100 million were registered as compared to 1985 sales of 66,789 tons, valued at $75 million.

The 1987 Malaysian budget raised cigarette sales taxes by 5 percent, the increase is expected to have no impact on sales.

The Saudi Arabian Government has issued new regulations pertaining to cigarette tar and nicotine contents. In addition, health warnings are to be printed in English and Arabic. The Government is further requiring that beginning July 1, 1987, all tobacco product sold in Saudi Arabia must not only comply with the above regulations but detailed information about the products must also be provided. Saudi Arabia is the third largest cigarette market for U.S. cigarettes with annual purchases of $149 million.

The Government of Turkey announced increases in the selling prices for all Monopoly items, effective October 10, 1986. Cigarette prices were raised 16 to 60 percent, with popular domestic brands and imported brands raised 60 and 34 percent, respectively. Also in Turkey, the export prices for Oriental have been announced. Prices were maintained at last year's level for the 1985 and 1984 crops while reducing the prices on some lower qualities of the 1983 crop.

The Turkish Government for the first time has announced producer support prices for the upcoming season before planting begins. The early announcement may be an attempt to minimize producers' reactions to the recent price increases on cigarettes.

The Zimbabwe flue-cured auction ended on October 13, 1986, after 25 weeks of sales. Total sales of 114,304 tons at an average price of $1.85 per kilogram were recorded. This compares with 105,556 tons sold at the close of last season, when the average price was $1.66 per kilogram.

World Developments Affecting Tobacco Demand

The Hong Kong Government recently enacted legislation that will ban the import, manufacture, and sale of smokeless tobacco. The ban is considered a preventive measure by the Medical Health Service which claims the product has been associated with oral cancer. U.S. exports of smokeless tobacco to Hong Kong during 1985 were 4 tons valued at $16,000. For January-September 1986 U.S. exports were 2 tons valued at $16,000 compared to 1 ton valued at $3,000 for the same period in 1985.

The 1987 Malaysian budget was unveiled October 24. Among its provisions are increases for cigarette sales taxes. The taxes will increase from 10 percent to 15 percent. The impact on sales is expected to be negligible. Import duties were not changed.

Saudi Arabia has followed Oman's lead (see October Circular FT-10-86 page 3) by setting new, stricter standards for cigarettes and tobacco products. Regulation SSA 362/1982 which will go into effect June 20, 1987, requires that nicotine content not exceed 0.8 mg. and tar content not exceed 12 mg. per cigarette. The production month and year must be printed on each packet as well as the following message on the front side in both Arabic and English: "Health Warning: Smoking is the main cause for lung cancer, lung diseases and for heart and arteries diseases" (sic). SSA 465/1986, effective July 1, 1987, sets new labeling requirements for all tobacco products other than cigarettes. Required information will include: name of the type; net weight; month and

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year of manufacturing; percentage of nicotine in tobacco smoke or the tobacco itself; percentage of tar in tobacco smoke; trademark; batch number; name of producer or exporter; additives in descending order of proportion; and the following message on the front of the package: "Heath Warning: Smoking is the main cause of lung cancer and diseases of the lung and arteries." In 1985, U.S. cigarette exports to Saudi Arabia exceeded $149 million and ranked third among all U.S. cigarette markets.

Effective October 10, 1986, the Government of Turkey announced increases in the selling prices for all Monopoly items, including tobacco products. For cigarettes, prices rose by 16 to 60 percent. The largest increase was incurred by the more popular domestic brands, where prices rose 60 percent from US$0.30 per pack to US$0.48 per pack. For imported cigarettes, prices increased 17 to 34 percent, rising from US$0.83 per pack to US$0.97-$1.11 per pack.

The Turkish Treasury and Foreign Trade Undersecretariat announced minimum export prices for unmanufactured oriental tobacco for the 1986/87 marketing season. Export prices for the 1984 and 1985 crops will remain at last year's levels, while prices for the lower quality grades of the 1983 crop were reduced 10-20 U.S. cents per kilogram. The retention of export prices at last year's levels is apparently an attempt to keep Turkish prices competitive with other Oriental tobacco exporters. During 1985, U.S. imports from Turkey totaled 51,931 tons, or approximately 50 percent of Turkey's annual export volume. Prices in U.S. dollar terms for all grades are listed below.

Type and Quality	1983 Crop	1984 Crop	1985 Crop
	US$/KG.	US$/KG.	US$/KG.
Aegean (Izmir)			
American Grade	4.40	4.40	4.40
B Grade	2.60	2.85	2.85
Kappa Grade	1.65	1.80	1.80
Double Kappa	0.60	0.70	0.70
Scrap	0.30	0.40	0.40
Marmara (Bursa)			
American Grade	4.50	4.50	4.50
B Grade	3.15	3.30	3.30
Kappa Grade	1.75	1.85	1.85
Double Kappa	0.90	0.95	0.95
Scrap	0.40	0.40	0.40
Black Sea (Bafra)			
American Grade	4.60	4.60	4.60
B Grade	3.25	3.40	3.40
Kappa Grade	1.75	1.90	1.90
Double Kappa	0.90	0.95	0.95
Scrap	0.40	0.40	0.40
Black Sea (Samsun)			
American Grade	4.70	4.70	4.70
B Grade	3.35	3.55	3.55
Kappa Grade	1.80	1.90	1.90
Double Kappa	0.90	0.95	0.95
Scrap	0.40	0.40	0.40

World Developments Affecting Tobacco Supply

Bulgaria's 1986 tobacco exports are expected to fall to 56,000 tons, down 10 percent from the 62,000 ton level of 1985. The smaller 1985 leaf crop is the primary reason for the lower shipments. Indications are that the 1986 Bulgarian tobacco crop may total only 119,000 tons--more than 6,000 tons below the expected 125,530-ton crop expected earlier in the season (both figures dry weight). Although the revised production is 10 percent above the 1985 crop, it is substantially below the 1982-84 average of 126,661 tons.

U.S. leaf exports to Bulgaria have averaged about 1,000 tons in recent years, with Bulgaria shipping 4,400 tons of leaf to the U.S. annually. The U.S. shipments are expected to remain at about the 1,000-ton level. Bulgarian exports to the U.S. may fall, given the lower supplies of leaf.

Canada's 1986 flue-cured crop is estimated at 28,152 hectares (harvested) and 63,144 tons (dry weight), 27 percent and 20 percent, respectively, less than the previous year. Weak domestic and export demand and higher tobacco product taxes were cited as reasons for the decline (see June 1986 Circular, FT-6-86 pages 4 and 19, for additional information). The Ontario Flue-Cured Tobacco Growers Marketing Board auction opened October 20, 1986. The following table compares 1985 and 1986 first-week auction results.

Ontario Flue-Cured Auction Report
October 31, 1986

	1986	1985
Tons to-date	7,947	8,694
Average Price (Can¢)	121.15	121.10
(US¢) 1/	87.24	86.28

1/ 1985 US $1.00 = C$0.7125
1986 US $1.00 = C$0.7201

Greek tobacco exports during the January-August 1986 period totaled 57,484 tons valued at US$141 million. This is down 6.7 percent in quantity and up 18.4 percent in value when compared with the same period last year. The average value of the leaf--most of which was 1984 crop tobacco--was US$2.45 per kilogram. The United States is the largest customer for Greek tobacco exports followed by the Federal Republic of Germany and other European Community countries.

In Malawi, tobacco markets closed on October 9, 1986, after 26 weeks of sales. Sales of all types of tobacco totaled 63,540 tons, valued at 179 million kwacha (US$100 million), averaging 2.81 kwacha per kilogram (US$1.57). During the 1985 sales season, 66,789 tons, valued at 129 million kwacha (US$75 million), averaged 1.93 kwacha per kilogram (US$1.12). Quantity auctioned and prices for each tobacco type are provided below.

Final Malawi Auction Report
Sales Ending October 14, 1986

Type Tobacco	Quantity in Metric Tons 1985	1986	Avg. Value/ Kilogram 1985 1/	1986 1/
Burley	30,372	30,190	K1.82 US$1.06	K2.91 US$1.63
Flue-Cured	22,281	21,034	K2.37 US$1.37	K3.03 US$1.70
Fire-cured, main crop (Northern Div.)	11,267	9,208	K1.58 US$0.92	K2.39 US$1.34
Fire-cured, lower leaf (Northern Div.)	1,210	1,680	K0.91 US$0.53	K1.54 US$0.86
Fire-cured, main crop (Southern Div.)	598	474	K0.95 US$0.55	K1.73 US$0.97
Sun/air-cured	1,065	954	K1.07 US$0.62	K1.70 US$0.95
Total all types	66,789	63,540	K1.93 US$1.12	K2.81 US$1.57

1/ 1985 US$0.58 = 1 kwacha.
1986 US$0.56 = 1 kwacha.

For the first time in history, the Turkish Government has announced producer support prices for the upcoming season before planting begins. The price increase, which is based on an 1987 inflation rate of 20 percent, increases the support price on tobacco by 20-40 percent.

The announcement was apparently an attempt to minimize producers' reactions to recent cigarette price increases. Prices for the American-grade qualities were set at around US$3.90 per kilogram, while prices for the lower-quality B-grades were set at around US$1.30 per kilogram. Despite the pre-season announcement, local farmers consider the increase too low based on projected increases in the overall price level.

The Zimbabwe flue-cured auction sales were completed on October 13 after 25 weeks of selling. The auction had marketed 114,304 tons of tobacco at an average price of Z$3.13 per kilogram (US$1.85). This compares with 105,556

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metric tons sold at the close of last season, at an average price of Z$2.68 per kilogram (US$1.66). A record average price of US$2.17 per kilogram was registered in the 21st week. Prices started plummeting by mid-September and ended with an average price of US$1.14 per kilogram (25th week).

Part of the fall in the final weekly average price is attributed to lower quality and badly handled tobacco on offer and, in part, to declining grade prices. The decline in grade prices was due to lack of demand, and may be an indication that world supply is running ahead of demand. The U.S. flue-cured markets experienced a similar price drop at the end of the season with an increasing amount of tobacco going to stabilization. (See the U.S. Auction report below).

Final Zimbabwe Auction Report
Sales Ending October 13, 1986

Quantity in Metric Tons		Average Value/ Kilogram	
1985	1986	1985	1986
105,556	114,304	Z$2.68 US$1.66	Z$3.13 US$1.85

1/ 1985 US$0.62 = Z$1.00.
1986 US$0.59 = Z$1.00.

US Tobacco Developments

On November 6, USDA announced new-crop price support levels for 1986 for seven types of tobacco. The price support levels for most types will increase 1 percent from 1985. However, the support level for burley is unchanged and, at the request of the Dark Tobacco Sales Cooperative, the support level for sun-cured (type 37) was reduced about 3 percent to maintain price relationships between certain grades of fire-cured and sun-cured tobaccos.

U.S. Tobacco Support Levels

Kind	1986 Support Level Dollars Per Pound	1985 Support Level Dollars Per Pound
Fire-cured (type 21)	$1.200	$1.188
Fire-cured (types 22-23)	1.242	1.230
Dark air-cured (types 35-36)	1.058	1.047
Sun-cured (type 37)	1.060	1.094
Cigar binder & filler (types 42-44, 53-55)	0.916	0.907
Puerto Rican cigar filler (type 46)	0.750	0.740
Burley (type 31)	1.488	1.488

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The 1986 burley auction market will open November 24. It will close for the Thanksgiving holiday after 3 sales days and resume December 2.

As of November 12, the U.S. flue-cured auction markets had gross sales of 332.5 million tons, with an average market price of $3.36 per kilogram. Compared to last year, gross sales are down almost 18 percent from the 1985 gross sales figure of 390.9 million tons. With all but several "Middle Belt" markets closed, sales are expected to end by late November.

Flue-Cured Auction Markets

	Wednesday, Nov. 12, 1986			Season-To-Date		
	Gross sales		Loan Receipts	Gross Sales		Loan Receipt
Type	Tons	Avg. $/Kg.	Tons	Tons	Avg. $/Kg.	Tons
GA.	Closed Oct. 2, 1986			36,096	3.47	531
FLA.	Closed Sept. 25, 1986			7,067	3.61	39
TYPE 14	Closed Oct. 2, 1986			43,163	3.50	570
S.C.	Closed Oct. 16, 1986			36,988	3.16	3,678
N.C.	Closed Oct. 21, 1986			30,321	3.37	1,387
TYPE 13	Closed Oct. 21, 1986			67,309	3.25	5,065
TYPE 12	Closed Oct. 27, 1986			118,704	3.44	6,627
VA.	374	2.87	132	34,686	3.35	5,214
N.C.	281	2.87	76	68,643	3.25	7,453
TYPE 11	655	2.87	208	103,329	3.28	12,667
All Flue	655	2.87	208	332,505	3.36	24,929

Source: Daily Tobacco Market News Summary No. 59

U.S. Export Forecast Revised

The 1986 tobacco export forecast has been adjusted downward due to changing trade practices within the industry. In recent months the export level of flue-cured tobacco has fallen abruptly due to the growing practice of declaring this tobacco as "smoking tobacco in bulk," and "smoking tobacco, NEC", both of which are manufactured tobacco products.

USDA is currently seeking public comments on the 1987 flue-cured tobacco national marketing quota and price support level. Comments are also requested on the method of calculating certain components of the quota and price support.

The national marketing quota is calculated by totaling (1) intended purchases by domestic cigarette manufacturers, (2) the average of exports for the 1984-85, 1985-86, and 1986-87 marketing years, and (3) an adjustment to maintain loan stocks at a prescribed level. Last year, the USDA made a downward adjustment of 137 million pounds to the Census-reported exports based on indications of actual export purchases.

USDA must announce the national acreage poundage marketing quota for flue-cured tobacco for the 1987-88 marketing year no later than December 15, 1986. The 1987 marketing year begins July 1, 1987.

U.S. Trade Summary

U.S. unmanufactured tobacco exports during September 1986 were 10,317 metric tons, valued at $59.6 million, down 46 percent in volume and 47 percent in value from September 1986, and down 4.6 percent from a month earlier. The January-September 1986 shipments totaled 120,609 tons, valued at $719.7 million, compared to 145,591 tons for the same period in 1985. The drastic decrease is reflected in lower exports of unmanufactured tobacco. The greatest declines were registered to Europe (mostly Spain and Switzerland), Africa, and North America (down 76 and 19 percent respectively). The leading markets during January-September 1986 were the Federal Republic of Germany (24,812 tons), Japan (12,191 tons), the Netherlands (10,051 tons), Italy (7,699 tons), and the United Kingdom (5,909 tons).

Flue-Cured tobacco exports during September 1986 totaled 5,607 tons, valued at $34.4 million, down 56 percent in volume and 55 percent in value from September 1985. The January-September 1986 figures show flue-cured exports at 50,095 tons, valued at $316.4 million. This compares to 1985 export volume of 75,242 tons at $483.4 million, indicating a decrease of 33 percent in volume and 35 percent in value. Leading markets were the Federal Republic of Germany (12,642 tons), United Kingdom (4,478 tons), Italy (3,460 tons), Denmark (3,086 tons), and the Netherlands (2,521 tons). As mentioned earlier, shipments to a number of major leaf markets have been considerably lower than the same period last year. Flue-cured exports to Spain during January-September 1986 totaled only 274 tons, valued at $2 million, compared with 11,411 tons, valued at $78.6 million a year ago. Bulk smoking tobacco exports to this market have increased from 3,292 tons last season to 12,148 tons this year. Shipments to other European markets, such as Italy, Sweden, Ireland, Finland, and Switzerland are off by 1,000 to 2,000 tons individually for the same period a year ago. In the African market, Egypt has not received any shipment to date, as opposed to total shipments of 3,576 tons, valued at $17.3 million for the same period last year. Another significant difference from 1986 is Iraq's purchase of 3,000 tons at $14 million for the January-September 1985 period. Substantial shipments to both Egypt and Iraq are expected during the last quarter of 1986 under the GSM-102 and -103 credit guarantee programs.

Burley tobacco exports were 1,227 tons in September, valued at $7.3 million. September 1986 exports were about 50 percent the volume of a year ago. January-September 1986 exports totaled 39,516 tons as compared with 40,186 tons in 1985, with values of $257.2 million and $297.5 million respectively. The leading markets this year are Japan with 10,094 tons, the Federal Republic of Germany (8,485 tons), the Netherlands (3,901 tons), Italy (3,852 tons), and Thailand (3,415 tons). The most significant decline in export sales for January-September 1986 is Switzerland, registering 1,543 tons as opposed to 4,751 tons in 1985. On the other hand, the Netherlands increased its purchase to 3,901 tons as compared with a low of 216 tons a year ago.

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Cigarette exports were off slightly in September 1986. Shipments for the month totaled 5.3 billion pieces valued at $110.2 million compared to 5.5 billion pieces in September 1985, valued at $112.2 million. For January-September 1986, exports totaled 45.9 billion, valued at $934 million, an 8-percent increase over the same period a year ago. Belgium-Luxembourg remains the major market with 13 billion pieces. Other leading markets were Japan (6 billion pieces), Saudi Arabia (4.5 billion pieces), and Singapore (2 billion pieces).

Exports of manufactured products continue above last year's shipments. September 1986 exports of the category smoking tobacco in bulk gained 2,798 tons as compared to a low of 276 tons a year ago. Through September, shipments totaled 18,072 tons, valued at $127 million, compared to 4,176 tons, valued at $33.5 million last year. Spain absorbed a total of 2,069 tons in September 1986, making it the largest market for this category. Shipments through September 1986 show Spain with a cumulative total of 18,072 tons ($82 million), followed by Algeria (862 tons), Finland (806 tons), Italy (690 tons), and Egypt (621 tons).

Exports in the manufactured customs category smoking tobacco, NEC fell by 93 percent in September 1986 to 100 tons compared to September 1985. Total shipments through September 1986 however, show a gain in volume of 48 percent, with a cumulative total of 15,288 tons valued at $37 million. Leading markets for the January-September 1986 period were West Germany (7,383 tons), the Netherlands (5,115 tons), and Belgium-Luxembourg (1,283 tons).

The continued increases in exports of "smoking tobacco in bulk" and "smoking tobacco, NEC" will subsequently reduce the total export volume of unmanufactured tobacco for 1986. In view of the above, projected exports for 1986 have been reduced to 225,000 tons. Two new categories have been introduced to the U.S. Trade Summary Table in the term of "smoking in bulk" and "smoking tobacco, NEC."

Unmanufactured tobacco imports for consumption (duty paid) during September 1986 totaled 18,017 tons, valued at $52 million, an increase in volume of 17 percent and in value of 22 percent from September 1985. For January-September 1986, duty-paid imports were 157,336 tons, valued at $452.9 million. This is an 8-percent volume increase and a 7 percent value increase over the same period a year ago. Oriental tobacco imports during the January-September 1986 period totaled 57,681 tons, valued at $203.6 million compared with 1985 volume and value of 56,263 tons and $200.7 million respectively. Unit value has declined to $3,529 per metric tons, compared to last year's $3,567.

General Imports (actual arrivals) of unmanufactured tobacco for September 1986 were 11,384 tons, valued at $29.8 million, a decrease of 32 percent in volume and 18 percent in value. For the January-September 1986 period, actual arrivals were 162,947 tons, valued at $4.53 million, with a 4-percent value increase and almost the same volume as a year ago. Actual arrivals of Oriental leaf during the January-September 1986 period totaled 60,651 tons, valued $210.7 million, a 5-percent increase in value, with volume slightly lower than a year ago.

U.S. TOBACCO TRADE SUMMARY: 1985-1986

	September		January - September		January - December	
	1985	1986	1985	1986	1985	1986 1/
Exports						
Unmanufactured Tobacco						
MT	18,960	10,317	145,591	120,609	249,015	225,000
$1,000	111,559	59,671	922,851	719,716	1,520,644	1,327,500
$1 M.T	5,884	5,784	6,339	5,967	6,107	5,900
Manufactured Tobacco, Smoking in Bulk						
MT	276	2,798	4,176	18,072	5,408	25,000
$1,000	2,352	19,802	33,561	126,924	42,672	175,000
$1 M.T	8,522	7,077	8,037	7,023	7,891	7,000
Smoking Tobacco, NEC						
MT	1,352	100	10,341	15,288	13,484	16,000
$1,000	3,435	432	26,073	37,296	34,346	39,000
$1 M.T	2,541	4,320	2,521	2,440	2,547	2,438
Cigarettes						
Bill pc	5.5	5.3	42.6	45.9	58.9	60.0
$1,000	112,183	110,224	856,412	934,534	1,179,938	1,200,000
Imports for Consumption						
Unmanufactured Tobacco 2/						
MT	15,252	17,916	144,497	156,578	196,452	200,000
$1,000	41,999	51,616	419,725	449,358	576,137	580,000
$1 M.T	2,754	2,8881	2,905	2,870	2,933	2,900
General Imports						
Unmanufactured Tobacco						
MT	16,773	11,384	162,548	162,947	202,040	195,000
$1000	36,352	29,878	435,548	453,438	539,168	546,000
$1 M.T	2,167	2,624	2,680	2,783	2,669	2,800
Unmanufactured Tobacco Imports from CBI Countries in MT						
Imports for Consumption	95	275	10,005	8,672	11,113	10,000
General	1,33	167	9,970	7,956	10,982	10,000

1) Forecast
2)Includes the category, "Tobacco manufactured or not manufactured, not specially provided for"

CBI countries: Antigua and Barbuda, Bahamas, Barbados, Belize, British Virgin Islands, Costa Rica, Dominica, Dominican Republic, El Salvador, Grenada, Guatemala, Haiti, Honduras, Jamaica, Montserrat, Netherlands Antilles, Panama, St. Christopher-Nevis, St. Lucia, St. Vincent & Grenadines, Trinidad & Tobago.

November 1986

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FAS, USDA

U.S. EXPORTS OF UNMANUFACTURED
TOBACCO BY QUANTITY AND VALUE
(IN METRIC TONS AND 1,000 DOLLARS)

TYPE TOBACCO	JAN-SEPT				SEPTEMBER			
	QUANTITY		VALUE		QUANTITY		VALUE	
	1985	1986 1/	1985	1986 1/	1985	1986 1/	1985	1986 1/
FLUE-CURED								
UNSTEMMED	11,337	10,265	64,847	54,609	560	1,169	3,430	6,236
STEMMED	63,904	39,830	418,526	261,760	12,175	4,438	73,011	28,174
TOTAL FLUE-CURED	75,242	50,095	483,373	316,369	12,736	5,607	76,441	34,410
BURLEY								
UNSTEMMED	4,821	5,216	26,731	27,246	72	494	215	3,036
STEMMED	35,365	34,300	270,811	229,960	2,187	733	16,291	4,319
TOTAL BURLEY	40,186	39,516	297,541	257,206	2,259	1,227	16,506	7,356
DARK FIRE KENTUCKY & TENN	4,090	4,047	19,652	18,439	582	407	2,584	1,790
VIRGINIA FIRE & SUN	628	921	3,410	4,797	156	373	822	1,972
MARYLAND	2,342	2,043	14,741	12,011	188	206	1,306	806
GREEN RIVER	2	2	13	10	2	0	13	0
ONE SUCKER	10	39	24	108	4	3	10	8
BLACK FAT	988	971	6,647	6,579	163	0	1,041	0
CIGAR LEAF								
CIGAR WRAPPER	704	806	16,965	22,285	8	19	50	379
CIGAR BINDER	97	35	636	98	1	8	3	22
CIGAR FILLER	70	77	384	381	1	0	2	0
TOTAL CIGAR LEAF	871	918	17,985	22,765	9	27	56	400
PERIQUE	48	29	836	225	0	0	0	0
OTHER LEAF TOBACCO	2,290	2,093	18,515	16,092	315	272	2,410	2,054
STEMS, TRIMMINGS, & SCRAP	18,894	19,935	60,113	65,115	2,545	2,195	10,371	10,875
TOTAL UNMANUFACTURED	145,591	120,609	922,851	719,716	18,960	10,317	111,559	59,671

NOTE: TOTALS MAY NOT ADD DUE TO ROUNDING.
1/ PRELIMINARY.
NOVEMBER 1986

U.S. EXPORTS OF FLUE-CURED
TOBACCO BY COUNTRY OF DESTINATION
(IN METRIC TONS AND 1,000 DOLLARS)

COUNTRY	JAN-SEPT				SEPTEMBER			
	QUANTITY		VALUE		QUANTITY		VALUE	
	1985	1986 1/	1985	1986 1/	1985	1986 1/	1985	1986 1/
EUROPEAN COMMUNITY (EC)								
BELGIUM-LUXEMBOURG	1,681	1,549	10,326	10,448	200	95	1,124	646
DENMARK	3,357	3,086	25,143	23,324	180	645	1,375	4,880
FRANCE	260	164	996	1,373	0	0	0	0
GERMANY, FED. REP. OF	11,557	12,642	73,414	77,714	1,809	1,778	11,419	10,001
GREECE	63	199	178	1,108	0	29	0	197
IRELAND	1,829	843	12,252	4,648	0	0	0	0
ITALY	5,490	3,460	34,488	17,704	158	77	1,325	339
NETHERLANDS	2,465	2,521	16,418	15,841	621	275	3,916	1,865
PORTUGAL	23	15	1	129	0	0	0	0
SPAIN	11,411	274	78,572	2,005	1,622	0	11,210	0
UNITED KINGDOM	4,489	4,478	28,417	28,785	880	588	6,185	3,664
TOTAL EC-12	42,626	29,231	280,204	183,078	5,470	3,488	36,552	21,592
OTHER MAJOR MARKETS								
JAPAN	114	147	65	1,074	0	0	0	0
TAIWAN	1,651	1,389	8,714	8,821	0	0	0	0
THAILAND	5,091	2,484	27,391	12,742	0	0	0	0
EGYPT	3,576	0	17,322	0	2,068	0	9,878	0
SWITZERLAND	2,090	701	11,813	3,677	108	222	647	1,175
MALAYSIA	2,167	2,209	17,769	16,264	240	350	1,859	2,349
PHILIPPINES	1,674	1,524	12,433	11,677	207	0	1,622	0
AUSTRALIA	2,000	2,754	15,265	19,887	0	136	0	982
FINLAND	1,259	376	10,007	2,691	251	26	1,957	165
SWEDEN	2,357	1,395	16,063	8,722	767	540	6,008	3,138
ALGERIA	0	200	0	1,375	0	0	0	0
INDONESIA	345	227	2,529	1,319	0	44	0	198
CANADA	380	164	2,462	1,090	0	74	0	502
NEW ZEALAND	490	648	3,758	4,818	36	57	278	372
HONG KONG	2,127	2,237	13,325	13,165	245	239	1,517	1,352
NORWAY	564	938	3,171	5,253	203	243	1,185	1,338
KOREA, REPUBLIC OF	529	611	3,506	3,115	0	0	0	0
AUSTRIA	237	718	1,538	4,800	30	105	192	704
BULGARIA	291	200	1,828	1,414	0	0	0	0
TOTAL	26,943	18,923	168,959	121,906	4,155	2,036	25,144	12,274
REST OF WORLD	5,673	1,941	34,210	11,384	3,111	83	14,745	544
WORLD TOTAL	75,242	50,095	483,373	316,369	12,736	5,607	76,441	34,410

NOTE: TOTALS MAY NOT ADD DUE TO ROUNDING.
PRELIMINARY.
NOVEMBER 1986

U.S. EXPORTS OF BURLEY
TOBACCO BY COUNTRY OF DESTINATION
(IN METRIC TONS AND 1,000 DOLLARS)

COUNTRY	JAN-SEPT				SEPTEMBER			
	QUANTITY		VALUE		QUANTITY		VALUE	
	1985	1986 1/	1985	1986 1/	1985	1986 1/	1985	1986 1/
EUROPEAN COMMUNITY (EC)								
BELGIUM-LUXEMBOURG	1,503	1,093	11,103	7,291	100	61	860	336
DENMARK	1,155	853	9,702	7,245	194	16	1,548	31
FRANCE	455	431	3,564	2,993	0	0	0	0
GERMANY, FED. REP. OF	9,111	8,485	66,262	54,847	513	539	3,831	3,409
ITALY	4,043	3,852	22,666	19,131	0	0	0	0
NETHERLANDS	216	3,901	1,751	25,603	12	0	104	0
PORTUGAL	0	133	0	1,124	0	0	0	0
SPAIN	72	0	215	1	72	0	215	0
UNITED KINGDOM	359	55	2,901	429	39	0	325	0
TOTAL EC-12	16,913	18,804	118,164	118,663	930	616	6,883	3,776
OTHER MAJOR MARKETS								
JAPAN	10,220	10,094	83,160	71,720	0	0	0	0
SWITZERLAND	4,751	1,543	35,502	9,824	72	94	559	155
THAILAND	2,985	3,415	20,169	17,841	0	0	0	0
INDONESIA	11	502	86	2,736	0	0	0	0
PHILIPPINES	1,904	1,991	16,610	16,885	228	0	2,028	0
SWEDEN	559	588	4,233	3,895	281	349	2,134	2,324
EGYPT	629	0	3,228	0	420	0	2,210	0
HONG KONG	1,001	654	7,948	4,154	276	24	2,231	177
AUSTRALIA	141	164	1,144	1,198	0	0	0	0
LEBANON	0	375	0	1,746	0	0	0	0
FINLAND	129	126	1,146	962	39	21	331	154
CANADA	46	9	313	70	0	0	0	0
TOTAL	22,376	19,460	173,540	131,030	1,315	487	9,492	2,810
REST OF WORLD	897	1,253	5,838	7,513	14	125	131	769
WORLD TOTAL	40,186	39,516	297,541	257,206	2,259	1,227	16,506	7,356

NOTE: TOTALS MAY NOT ADD DUE TO ROUNDING.
1/ PRELIMINARY.
NOVEMBER 1986

U.S. EXPORTS OF UNMANUFACTURED
TOBACCO BY COUNTRY OF DESTINATION
(IN METRIC TONS AND 1,000 DOLLARS)

COUNTRY	JAN-SEPT				SEPTEMBER			
	QUANTITY		VALUE		QUANTITY		VALUE	
	1985	1986 1/	1985	1986 1/	1985	1986 1/	1985	1986 1/
EUROPEAN COMMUNITY (EC)								
BELGIUM-LUXEMBOURG	3,783	3,060	24,225	19,330	336	196	2,208	1,212
DENMARK	5,648	4,928	35,500	31,521	648	713	2,960	4,982
FRANCE	2,861	2,465	14,042	16,378	95	95	876	914
GERMANY, FED. REP. OF	24,064	24,812	152,914	140,960	3,068	2,739	17,001	13,915
GREECE	124	321	612	1,690	0	52	0	349
IRELAND	2,166	1,361	12,386	5,557	0	0	0	0
ITALY	10,434	7,699	61,924	38,740	158	77	1,325	339
NETHERLANDS	5,317	10,051	31,227	56,975	1,218	782	6,425	3,833
PORTUGAL	46	147	205	1,253	0	0	0	0
SPAIN	15,575	5,228	111,952	39,761	2,407	847	16,834	6,966
UNITED KINGDOM	5,959	5,909	32,107	30,298	925	828	6,540	4,305
TOTAL EC-12	75,977	65,983	477,095	382,463	8,854	6,329	54,169	36,816
OTHER MAJOR MARKETS								
JAPAN	10,677	12,191	83,425	73,953	0	0	0	0
THAILAND	8,079	5,899	47,591	30,583	0	0	0	0
SWITZERLAND	9,116	3,670	55,409	20,590	304	409	2,174	1,765
EGYPT	5,300	413	22,379	2,276	2,762	0	12,898	0
TAIWAN	1,721	1,389	8,748	8,821	0	0	0	0
PHILIPPINES	3,723	3,516	30,047	28,564	435	0	3,650	0
INDONESIA	711	779	3,815	4,133	0	44	0	198
AUSTRALIA	2,490	3,634	16,715	21,364	0	187	0	1,009
MALAYSIA	3,186	3,256	24,042	23,126	352	649	2,569	4,184
SWEDEN	4,455	3,621	21,861	14,955	1,084	1,063	8,314	6,275
FINLAND	1,610	931	11,362	5,367	343	83	2,369	451
CANADA	905	448	3,495	1,692	4	81	37	526
CHILE	3	1	31	17	0	0	0	0
HONG KONG	3,685	3,310	23,147	17,731	572	428	3,945	1,660
DOMINICAN REPUBLIC	1,225	1,061	17,880	24,288	42	91	351	1,405
NEW ZEALAND	646	828	3,954	5,082	61	58	301	378
ALGERIA	172	200	1,259	1,375	0	0	0	0
NORWAY	1,092	1,655	6,069	9,024	299	444	1,641	2,421
AUSTRIA	369	788	1,669	5,220	66	154	197	996
BULGARIA	490	339	2,716	2,155	36	0	15	0
POLAND	405	383	1,500	1,552	0	0	0	0
KOREA, REPUBLIC OF	529	612	3,506	3,120	0	0	0	0
SINGAPORE	367	432	2,155	2,609	55	18	279	129
ECUADOR	53	54	324	256	0	3	0	16
TOTAL	61,012	49,411	393,102	307,852	6,415	3,712	38,741	21,412
REST OF WORLD	8,602	5,215	52,654	29,401	3,691	276	18,648	1,443
WORLD TOTAL	145,591	120,609	922,851	719,716	18,960	10,317	111,559	59,671

NOTE: TOTALS MAY NOT ADD DUE TO ROUNDING.
1/ PRELIMINARY.
NOVEMBER 1986

U.S. EXPORTS OF MANUFACTURED
TOBACCO BY QUANTITY AND VALUE
(IN MILLION PIECES, METRIC TONS, & 1,000 DOLLARS)

TYPE PRODUCT	JAN-SEPT				SEPTEMBER			
	QUANTITY		VALUE		QUANTITY		VALUE	
	1985	1986 1/	1985	1986 1/	1985	1986 1/	1985	1986 1/
CIGARETTES (PCS)	42,590	45,868	856,412	934,534	5,524	5,329	112,183	110,224
CIGARS, UNDER 3 LBS/1000 (PCS)	35	13	565	215	0	4	11	60
CIGARS, 3 OR MORE LBS/1000 (PCS)	44	51	3,750	3,839	4	7	370	457
CHEWING AND SNUFF (MT)	370	433	2,113	2,444	31	32	177	180
SMOKING TOBACCO IN PACKAGE (MT)	208	279	1,969	2,272	28	46	261	350
SMOKING TOBACCO IN BULK (MT)	4,176	18,072	33,561	126,924	276	2,798	2,352	19,802
SMOKING TOBACCO, NEC (MT)	10,341	15,288	26,073	37,296	1,352	100	3,435	432
TOTAL MANUFACTURED			924,442	1,107,524			118,790	131,505

NOTE: TOTALS MAY NOT ADD DUE TO ROUNDING.
1/ PRELIMINARY.
NOVEMBER 1986

BEST COPY AVAILABLE

U.S. EXPORTS OF CIGARETTES
BY COUNTRY OF DESTINATION
(IN MILLION PIECES AND 1,000 DOLLARS)

COUNTRY	JAN-SEPT				SEPTEMBER			
	QUANTITY		VALUE		QUANTITY		VALUE	
	1985	1986 1/	1985	1986 1/	1985	1986 1/	1985	1986 1/
EUROPEAN COMMUNITY (EC)								
BELGIUM-LUXEMBOURG	8,635	12,740	188,032	284,981	1,698	1,707	36,909	38,384
DENMARK	23	18	514	409	4	10	92	210
FRANCE	16	1	329	17	0	0	0	0
GERMANY, FED. REP. OF	739	604	15,240	13,149	27	1	221	27
GREECE	18	4	355	88	0	0	0	0
ITALY	2	9	49	195	0	4	0	96
NETHERLANDS	615	919	13,572	17,943	0	213	0	4,665
PORTUGAL	4	6	89	138	0	2	0	45
SPAIN	683	617	13,625	13,234	41	44	847	964
UNITED KINGDOM	369	1	7,316	18	0	0	0	0
TOTAL EC-12	11,105	14,919	239,120	330,172	1,771	1,980	38,069	44,391
OTHER MAJOR MARKETS								
HONG KONG	5,120	5,937	102,561	122,345	499	598	9,915	12,676
SAUDI ARABIA	5,538	4,454	125,291	104,278	729	413	16,947	9,791
JAPAN	4,711	6,133	69,467	87,975	515	845	7,633	12,333
NETHERLANDS ANTILLES	1,107	952	20,486	14,823	146	168	2,219	2,619
LEBANON	1,384	784	29,500	16,807	387	32	8,222	603
PANAMA	1,073	1,335	22,390	28,121	161	202	3,436	4,313
SINGAPORE	2,259	2,096	44,362	42,577	238	314	4,721	6,234
EGYPT	920	92	19,864	2,019	69	4	1,485	84
MALAYSIA	75	163	1,358	3,295	10	12	210	267
COLOMBIA	24	64	493	1,180	2	16	25	284
KUWAIT	1,150	1,097	25,432	25,432	39	115	775	2,729
LIBYA	36	0	703	0	0	0	0	0
MOROCCO	767	669	15,028	13,702	66	61	1,307	1,348
CHILE	53	110	1,078	2,308	1	16	23	363
CANADA	463	414	8,315	7,979	50	53	1,013	1,174
CYPRUS	220	390	3,812	7,304	53	0	1,163	1
SOUTH AFRICA	534	321	10,724	6,994	45	81	909	1,797
ISRAEL	216	358	4,228	7,117	27	14	500	303
PARAGUAY	249	240	5,021	4,719	27	23	532	522
UNITED ARAB EMIRATES	1,993	1,313	35,090	23,923	207	9	3,442	190
AUSTRALIA	316	270	6,205	5,821	57	66	1,128	1,474
SWITZERLAND	151	276	3,303	5,620	97	10	2,144	227
ICELAND	125	238	2,338	5,036	22	1	368	22
TOTAL	28,483	27,705	557,047	539,375	3,448	3,051	68,115	59,355
REST OF WORLD	3,002	3,245	60,245	64,987	306	297	5,999	6,479
WORLD TOTAL	42,590	45,868	856,412	934,534	5,525	5,329	112,183	110,224

NOTE: TOTALS MAY NOT ADD DUE TO ROUNDING.
1/ PRELIMINARY.
NOVEMBER 1986

U.S. IMPORTS OF UNMANUFACTURED TOBACCO FOR CONSUMPTION BY QUANTITY AND VALUE (IN METRIC TONS AND 1,000 DOLLARS)

TYPE TOBACCO	JAN-SEPT				SEPTEMBER			
	QUANTITY		VALUE		QUANTITY		VALUE	
	1985	1986 1/	1985	1986 1/	1985	1986 1/	1985	1986 1/
CIGARETTE LEAF								
FLUE CURED, UNSTEMMED	7,019	11,456	14,498	25,749	608	1,071	1,573	2,688
BURLEY, UNSTEMMED	6,234	3,960	13,709	7,229	53	266	97	669
ORIENTAL, UNSTEMMED	56,263	57,681	200,684	203,566	4,393	5,802	15,582	20,217
OTHER CIGARETTE LEAF, UNSTEMMED	679	1,229	1,666	3,024	4	176	11	521
STEMMED CIGARETTE LEAF	24,058	0	77,791	0	0	0	0	0
FL CURED STEMMED CIGARETTE LEAF	9,282	20,618	33,291	67,252	3,557	3,632	13,417	12,550
STEMMED LEAF NSPF	8,495	28,740	29,452	99,650	1,959	3,092	6,275	10,192
TOTAL CIGARETTE LEAF	112,030	123,685	371,091	406,470	10,573	14,039	36,956	46,836
CIGAR LEAF								
WRAPPER, UNSTEMMED	716	629	8,154	7,623	56	69	777	708
WRAPPER, STEMMED	67	80	815	1,811	1	20	4	570
MIXED FILLER AND WRAPPER	125	0	358	0	0	0	0	0
FILLER, UNSTEMMED	1,549	1,419	3,096	3,056	41	81	119	156
FILLER, STEMMED	1,357	731	5,474	3,603	24	97	111	436
TOTAL CIGAR LEAF	3,814	2,858	17,897	16,094	121	267	1,011	1,870
SCRAP								
CIGAR LEAF SCRAP	11,241	9,188	21,298	15,690	1,101	740	2,193	1,270
OTHER SCRAP	3,518	5,275	4,529	6,080	832	445	812	929
TOTAL SCRAP	14,759	14,463	25,827	21,770	1,933	1,185	3,004	2,199
TOBACCO MFG OR NOT MFG, NSPF	560	0	2,327	0	0	0	0	0
TOB X SMOKING FL CURED	150	271	545	1,027	65	54	237	196
TOB MFG NT MFG NSPF	341	487	931	2,579	55	47	272	190
STEMS	13,893	15,569	4,902	4,927	2,624	2,425	1,027	711
LEAF OF MIXED ORIGIN	1	2	8	97	0	0	0	0
TOTAL UNMANUFACTURED	145,548	157,336	423,528	452,964	15,373	18,017	42,508	52,002

NOTE: TOTALS MAY NOT ADD DUE TO ROUNDING.
1/ PRELIMINARY.
NOVEMBER 1986
TOBACCO, COTTON & SEEDS DIVISION,
USDA, WASHINGTON, DC 20250

FOREIGN AGRICULTURAL SERVICE

US TOBACCO IMPORTS, QUANTITY AND VALUE, SEP AND JAN-SEP, 1985, 1986

COMMODITY	UNIT:	JAN-SEP				SEP			
		QUANTITY		VALUE		QUANTITY		VALUE	
		1985 UNITS	1986 1/ UNITS	1985 1,000 DOL.	1986 1/ 1,000 DOL.	1985 UNITS	1986 1/ UNITS	1985 1,000 DOL.	1986 1/ 1,000 DOL.
MFGD PRODUCTS									
MANUFACTURED TOBACCO:									
CIGARETTES	MT	763	875	7,767	11,193	41	94	528	1,486
CIGARS & CHEROOTS	MT	886	909	31,813	31,264	120	116	4,034	3,633
MANUFACTURED OR NOT NEC	MT	1,520	1,143	13,431	12,455	157	110	1,622	1,254
TOTAL MANUFACTURED	MT	3,169	2,926	53,011	54,912	319	320	6,185	6,374

NOTE: TOTALS MAY NOT ADD BECAUSE OF ROUNDING.
PRELIMINARY.
SOURCE: BUREAU OF THE CENSUS.

NOVEMBER 1986

COMMODITY PROGRAMS, FAS, USDA

US TOBACCO IMPORTS, QUANTITY AND VALUE, SEP AND JAN-SEP, 1985, 1986

COMMODITY	UNIT:	JAN-SEP				SEP			
		QUANTITY		VALUE		QUANTITY		VALUE	
		1985 UNITS	1986 1/ UNITS	1985 1,000 DOL.	1986 1/ 1,000 DOL.	1985 UNITS	1986 1/ UNITS	1985 1,000 DOL.	1986 1/ 1,000 DOL.
UNMFGD LEAF									
GENERAL IMPORTS									
UNMANUFACTURED TOBACCO:									
CIGARETTE LEAF									
FLUE-CURED	MT	9,584	12,729	21,047	23,400	664	920	1,819	2,471
BURLEY	MT	7,201	6,199	13,471	11,626	36	33	45	24
TOB ST NOT OVER 35CNR	MT	47,719	50,541	144,370	154,133	4,889	5,143	13,100	18,390
ORIENTAL	MT	60,692	60,651	201,399	210,743	6,083	1,337	14,343	2,733
OTHER CIGARETTE LEAF	MT	1,171	982	2,664	2,570	341	40	841	133
TOTAL CIGARETTE LEAF	MT	126,368	131,100	384,950	407,472	12,013	7,673	30,147	23,932
CIGAR LEAF									
WRAPPER	MT	755	607	8,716	8,829	90	90	1,592	2,054
MIXED FILLER & WRAPPER	MT	168	0	628	0	0	0	0	0
FILLER	MT	6,230	4,466	11,567	9,541	137	396	350	1,083
TOTAL CIGAR LEAF	MT	7,154	5,073	20,912	18,370	226	486	1,943	3,137
SCRAP									
CIGAR LEAF SCRAP	MT	10,822	6,645	15,704	11,199	984	462	1,342	1,046
OTHER SCRAP	MT	3,805	4,155	5,843	7,276	847	305	1,425	667
TOTAL SCRAP	MT	14,627	10,800	21,547	18,475	1,810	767	2,768	1,713
STEMS	MT	13,560	15,034	4,753	5,152	2,602	2,375	985	702
UNMANUFACTURED	MT	431	0	1,911	0	0	0	0	0
TOB NSMOKING FL CURED	MT	150	429	545	1,292	65	54	237	196
TOB MFG NT MFG NSPF	MT	342	553	935	2,689	55	29	272	177
TOTAL UNMANUFACTURED	MT	162,548	162,947	435,548	453,438	16,773	11,384	36,352	29,878

NOTE: TOTALS MAY NOT ADD BECAUSE OF ROUNDING.
PRELIMINARY.
SOURCE: BUREAU OF THE CENSUS.

NOVEMBER 1986

COMMODITY PROGRAMS, FAS, USDA

TOBACCO SITUATION: PEOPLE'S REPUBLIC OF CHINA 1/

Summary: Total tobacco area and production (dry weight) in the People's Republic of China (PRC) for 1986 are forecast at 1.183 million hectares and 2.145 million tons, respectively. Most Chinese leaf production is of the flue-cured type which now makes up about 90 percent of total production. Most tobacco produced in the PRC is used domestically. Very little is exported. Stocks are relatively low, yet burdensome due to quality problems. Production and marketing are controlled by the Government through the China National Tobacco Company (CNTC). The methods of control include a procurement quota, allocation of inputs, and grading standards. In 1985, a new grading system was instituted which should insure a better quality crop.

Cigarette production for 1986 in the PRC is forecast at 1.27 trillion pieces. The CNTC is promoting increased filter production, in part, to improve the quality of Chinese cigarettes and, in part, for health reasons. One-third of the population smokes. Increased incomes are allowing the Chinese to purchase more expensive, higher quality cigarettes.

Unmanufactured Tobacco

Area and Production: Total tobacco area and production in the PRC for 1986 are forecast at 1.183 million hectares and 2.145 million tons, respectively. These are both down slightly from 1985's record-setting 1.252 million hectares and 2.236 million tons. Policy changes made prior to 1985, which allowed greater freedom to make planting decisions, were largely responsible for the record crop. Farmers responded to relative price relationships and planted more tobacco than expected. The record came despite an extremely wet spring which lowered quality in many areas. The slight reduction in 1986 is due to the combination of changed price relationships which were more favorable for grain and oilseed production and discouraged tobacco farmers, who switched crops because of the poor-quality 1985 crop.

Most Chinese tobacco production is of the flue-cured type, which now makes up approximately 90 percent of the total (up from about 85 percent during the 1982-1984 period and from 59 percent in 1971). Burley production is relatively new and increasing slowly. Burley production is expected to increase about 7 percent to 30,000 tons in 1986. The increasing dominance of flue-cured tobacco and the introduction of burley signals a decline in other tobaccos, especially the dark air-cured and sun-cured types.

Consumption: Virtually all tobacco produced in the PRC is used domestically. Flue-cured leaf is used in the manufacture of non-blended cigarettes. Dark types are mostly used on-farm in "roll-your-own" cigarettes. Burley, a relatively new crop, is being promoted by the Government as an export crop.

Trade: The PRC is involved in very little leaf trade. Over the last 25 years,

1/ Source: Office of Agricultural Counselor reports; FAS/Tobacco, Cotton and Seed Division records and international trade data.

total imports have ranged from zero to about 6 percent of production, while exports ranged from less than 1 percent to about 7 percent. Flue-cured tobaccos make up the bulk of the trade. As production of burley tobacco increases, it should take a larger share of the export market.

Imports from the U.S. are inconsequential now. During the early 1930's, U.S. leaf (mostly flue-cured) exports were as high as 60,000 tons. U.S. exports (and total Chinese imports) fell slowly until only 1,000 tons were shipped in 1947. All U.S. trade was embargoed in 1950. The 1971 initiative begun by President Nixon held high hopes for reestablishing trade with the Chinese mainland. For U.S. tobacco it is still only an opportunity for the future.

Hong Kong is the PRC's number one export market for all tobacco and tobacco products, taking almost half its total exports. Thailand has the largest share of the PRC unmanufactured tobacco import market, reaching as high as 76 percent in some recent years.

Stocks: China's tobacco stock levels are fairly small. Traditionally, tobacco is marketed and used in the manufacture of cigarettes in the year immediately following the harvest. Any tobacco added to the ending stock levels would be the poorest quality produced in that year. While stocks of low-quality tobacco are a tremendous burden on the industry, supplies of good quality leaf are chronically short.

Policy: Production and marketing are controlled by the Government through the CNTC. The methods of control include a procurement quota, allocation of inputs, and grading standards.

In 1985, the flue-cured grading system was changed to reduce the number of grades, reward production of higher grades and penalize production of lower grades. A 20-percent premium was paid for above medium-grade and a 20-percent penalty was enforced for below medium-grade tobaccos. The CNTC is the sole buyer and sets marketing quotas for which farmers sign production contracts. For 1985, the flue-cured quota was set at 1.8 million tons, 13 percent over actual production. Allocation to individual farmers of seed, fertilizer, and coal were based on contract size. For 1986, the grading standards were tightened and allocation of inputs will be based on the percentage of higher quality leaf marketed by the farmer.

The expansion in burley production is being promoted by increased procurement prices and new grading standards which reward production of top-grade leaf. In another policy change, cigarette companies are now allowed to purchase leaf from areas outside their local area. Formerly, 100 percent of their purchases had to come from the local tobacco corporation. This has been reduced to 80 percent. The manufacturer is free to acquire the other 20 percent from any other Chinese growing area. As a result, in 1985, farmers delivered all of their production to the manufacturing facilities immediately after curing. This was a hardship for the facilities which normally have storage space for only 3 months. This problem was to be ironed out in 1986.

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In a related innovation, manufacturing facilities are now allowed to enter into exclusive agreements with individual counties. The facilities agree to provide high-quality fertilizer and technical assistance but are not allowed to stray from the official price structure. Farmers agree to follow the advice provided and to sell their production to that facility. Although no additional price incentive is provided, the farmer benefits because a greater portion of his crop reaches the higher quality range if he follows the advice. Thus, a larger portion of his crop receives the bonus under the official price system.

Cigarettes

Production: Cigarette production in the PRC is forecast at 1.27 trillion pieces, up from 1.18 trillion in 1985. Filter production has risen to about 12 percent of total production and is growing. Increased production of filter cigarettes will allow top-quality leaf supplies to stretch further. This, combined with new grading standards which should insure greater high-quality leaf supplies, can allow cigarette production to increase at a rate faster than total leaf production. Over 3,000 brands are produced in 146 plants. Plans are to expand and upgrade manufacturing capacity and improve cigarette quality. CNTC has announced that all top-grade cigarettes will have filters which will stimulate growth in filter production. Non-blended cigarettes are traditionally the preferred type. However, the trend among younger smokers is toward blended cigarettes which should also affect the production balance. Increased filter production, as well as low-tar brands and brands containing medicinal herbs, partially resulted from increasing concerns about health risks.

Consumption: A 1984 survey found there are more than 340 million smokers in China, slightly more than one third of the population. The majority of smokers are men, 61 percent of all men compared to 7 percent of all women smoke. Despite health campaigns, demand is growing. Incomes have increased recently while cigarette prices have been stable. Thus, the increased demand is for higher quality cigarettes. Stocks of low-quality cigarettes are growing. Improved incomes are not only fueling demand for higher quality cigarettes, but also causing a shift to manufactured cigarettes from the "roll-your-own" type in rural areas. This, in turn, is partially responsible for the increasing importance of flue-cured production to the detriment of the darker types.

Trade: The PRC does not export cigarettes. Certain hotels were allowed to import and stock foreign cigarettes for the benefit of foreign tourists but this privilege was recently eliminated. Almost 100 percent of the cigarettes imported by the PRC came from Hong Kong. Currently, any cigarette manufacturer wishing to ship cigarettes to the PRC must agree to purchase Chinese leaf. A German company is building a new plant in Hong Kong whose main purpose will be to export cigarettes to the mainland.

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Table 1: Flue-cured Tobacco

Area and Production

1000 HA, 1000 MT

	1984		1985 (EST.)		1986 (EST.)	
	Area	Prod.	Area	Prod.	Area	Prod.
Henan	174	393	220	539	200	420
Yunnan	112	275	201	410	200	400
Guizhcu	99	215	173	275	170	260
Shandong	76	216	110	225	100	200
Hunan	50	86	75	133	70	115
Heilongjiang	31	61	33	69	40	85
Anjui	38	76	38	76	38	76
Hubei	22	34	40	63	35	54
Sichuan	26	39	39	59	35	52
National Total	715	1543	1070	2080	1000	1900

Source: Agricultural Counselor Report.

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TABLE 2: TOTAL UNMANUFACTURED TOBACCO IN MAINLAND CHINA
SUPPLY AND DISTRIBUTION 1959-1986
(METRIC TONS)

	YEAR	AREA (HECTARES)	BEGINNING STOCKS	DRY WEIGHT PRODUCTION	TOTAL IMPORTS	IMPORTS FROM US	TOTAL SUPPLY	TOTAL EXPORTS	TOTAL DOM. CONSUMPTION	ENDING STOCKS	TOTAL DIS-TRIBUTION
CHINA, MAINLAND	1959	774,989	500,000	714,416	0	0	1,214,416	52,022	518,000	644,394	1,214,416
	1960	794,414	644,394	591,942	1,578	0	1,237,914	28,002	538,000	671,912	1,237,914
	1961	513,962	671,912	408,236	0	0	1,080,148	12,188	558,000	509,960	1,080,148
	1962	560,501	509,960	530,707	95	0	1,040,762	3,627	576,000	461,135	1,040,762
	1963	664,913	461,135	633,827	3,286	0	1,098,248	4,071	597,000	497,177	1,098,248
	1964	709,024	497,177	692,572	3,588	0	1,193,337	5,046	616,000	572,291	1,193,337
	1965	751,922	572,291	703,221	3,275	0	1,278,787	5,466	635,000	638,321	1,278,787
	1966	756,778	638,321	712,366	4,917	0	1,355,604	9,593	656,000	690,011	1,355,604
	1967	785,511	690,011	763,395	6,700	0	1,460,106	14,094	674,000	772,012	1,460,106
	1968	700,120	772,012	688,216	5,473	0	1,465,701	26,085	695,000	744,616	1,465,701
	1969	670,983	744,616	673,584	4,355	0	1,422,555	30,989	714,000	677,566	1,422,555
	1970	689,194	677,566	693,995	4,105	0	1,375,666	16,310	733,000	626,356	1,375,666
	1971	669,769	626,356	732,308	4,037	0	1,362,701	23,000	754,000	585,701	1,362,701
	1972	639,477	585,701	714,478	0	0	1,300,179	27,000	772,000	501,179	1,300,179
	1973	669,425	501,179	813,673	0	0	1,314,852	30,000	793,000	491,852	1,314,852
	1974	710,000	491,852	867,600	0	0	1,359,452	28,000	812,000	519,452	1,359,452
	1975	746,000	519,452	864,000	0	0	1,383,452	28,000	831,000	524,452	1,383,452
	1976	775,000	524,452	873,500	0	0	1,397,952	25,500	851,000	521,452	1,397,952
	1977	738,000	521,452	1,025,100	0	0	1,546,552	20,000	877,000	649,552	1,546,552
	1978	784,000	649,552	1,117,260	0	0	1,766,812	20,000	839,260	907,552	1,766,812
	1979	633,000	907,552	846,900	0	0	1,754,452	25,000	890,000	839,452	1,754,452
	1980	512,000	839,452	760,320	50,000	50	1,649,772	10,000	1,052,300	587,472	1,649,772
	1981	757,000	587,472	1,347,300	80,000	10	2,014,772	10,000	1,150,000	854,772	2,014,772
	1982	1,124,000	854,772	1,961,100	30,000	0	2,845,872	50,000	1,441,000	1,354,872	2,845,872
	1983	768,393	1,354,872	1,307,920	10,510	0	2,673,302	27,400	1,399,500	1,246,402	2,673,302
	1984	897,000	1,246,402	1,722,300	10,510	127	2,979.212	26,756	1,615,810	1,336,646	2,979,212
	1985	1,252,100	1,336,646	2,236,164	10,510	99	3,583,320	19,200	1,788,810	1,775,310	3,583,320
	1986	1,183,100	1,775,310	2,063,908	10,300	100	3,849,518	24,400	1,891,600	1,933,518	3,849,518

NOVEMBER 1986
Tobacco, Cotton and Seeds Division

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TABLE 3: FLUE-CURED TOBACCO IN MAINLAND CHINA
SUPPLY AND DISTRIBUTION 1959-1986
(METRIC TONS)

COUNTRY	YEAR	AREA HECTARES	BEGINNING STOCKS	DRY WEIGHT PRODUCTION	TOTAL IMPORTS	U.S. LEAF IMPORTS	TOTAL SUPPLY	TOTAL EXPORTS	TOTAL DOM. CONSUMPTION	ENDING STOCKS	TOTAL DIS-TRIBUTION
CHINA, MAINLAND	1959	298,000	125,520	317,286	2,300	0	445,106	47,500	274,876	122,730	445,106
	1960	274,667	122,730	171,114	7,300	0	301,144	18,900	214,979	67,265	301,144
	1961	147,330	67,265	92,160	600	0	160,025	8,700	95,700	55,625	160,025
	1962	176,000	55,625	123,995	300	0	179,920	3,100	108,435	68,385	179,920
	1963	236,000	68,385	224,640	3,200	0	296,225	2,600	147,900	145,725	296,225
	1964	281,333	145,725	308,101	6,800	0	460,626	2,000	239,676	218,950	460,626
	1965	325,333	218,950	342,984	5,500	0	567,434	6,200	252,874	308,360	567,434
	1966	380,000	308,360	517,997	1,900	0	828,257	9,500	373,842	444,915	828,257
	1967	407,333	444,915	544,320	5,800	0	995,035	10,700	325,990	658,345	995,035
	1968	326,667	658,345	422,880	1,500	0	1,082,725	27,800	351,485	703,440	1,082,725
	1969	324,667	703,440	421,978	700	0	1,126,118	27,300	473,901	624,917	1,126,118
	1970	291,333	624,917	382,560	900	0	1,008,377	16,000	536,145	456,232	1,008,377
	1971	319,333	456,232	430,500	1,200	0	887,932	24,500	491,150	372,282	887,932
	1972	344,000	372,282	502,080	1,300	0	875,662	31,600	442,387	401,675	875,662
	1973	362,000	401,675	588,000	3,100	0	992,775	29,000	628,533	335,242	992,775
	1974	384,000	335,242	564,960	2,900	0	903,102	42,400	549,655	311,047	903,102
	1975	406,000	311,047	672,960	1,100	0	985,107	35,200	661,400	288,507	985,107
	1976	543,000	288,507	800,925	2,500	0	1,091,932	27,800	703,262	360,870	1,091,932
	1977	568,667	360,870	932,160	2,100	0	1,295,130	30,900	809,375	454,855	1,295,130
	1978	612,667	454,855	1,009,920	100	0	1,464,875	30,000	795,840	639,035	1,464,875
	1979	508,933	639,035	773,760	0	0	1,412,795	29,900	842,593	540,302	1,412,795
	1980	396,733	540,302	687,360	10,000	5	1,237,712	27,000	977,382	233,330	1,237,712
	1981	586,333	233,330	1,227,360	10,000	1	1,470,700	17,900	1,167,995	284,805	1,470,700
	1982	888,333	284,805	1,760,953	20,000	0	2,065,758	19,100	1,319,499	727,159	2,065,758
	1983	572,000	727,159	1,104,039	10,000	0	1,841,198	23,700	1,259,700	557,798	1,841,198
	1984	715,000	557,798	1,481,280	10,000	127	2,049,078	22,956	1,380,000	646,122	2,049,078
	1985	1,070,000	646,122	1,996,800	10,000	99	2,652,922	15,000	1,560,000	1,077,922	2,652,922
	1986	1,000,000	1,077,922	1,824,000	10,000	100	2,911,922	20,000	1,660,000	1,231,922	2,911,922

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24

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TABLE 4: BURLEY TOBACCO IN MAINLAND CHINA
SUPPLY AND DISTRIBUTION 1980-1986
(METRIC TONS)

COUNTRY	YEAR	AREA HECTARES	BEGINNING STOCKS	DRY WEIGHT PRODUCTION	TOTAL IMPORTS	U.S. LEAF IMPORTS	TOTAL SUPPLY	TOTAL EXPORTS	TOTAL DOM. CONSUMPTION	ENDING STOCKS	TOTAL DIS-TRIBUTION
CHINA, MAINLAND											
	1980	14,000	0	18,800	500	0	19,300	3,000	16,000	300	19,300
	1981	14,000	300	18,800	500	0	19,600	3,110	16,000	490	19,600
	1982	14,000	490	18,800	500	0	19,790	3,200	15,988	602	19,790
	1983	15,500	602	20,680	500	0	21,782	3,250	15,500	3,032	21,782
	1984	12,500	3,032	20,160	500	0	23,692	3,000	16,500	4,192	23,692
	1985	15,000	4,192	26,880	500	0	31,572	3,400	19,500	8,672	31,572
	1986	16,000	8,672	28,800	300	0	37,772	3,600	22,300	11,872	37,772

TABLE 5: ORIENTAL TOBACCO IN MAINLAND CHINA
SUPPLY AND DISTRIBUTION 1983-1986
(METRIC TONS)

COUNTRY	YEAR	AREA HECTARES	BEGINNING STOCKS	DRY WEIGHT PRODUCTION	TOTAL IMPORTS	U.S. LEAF IMPORTS	TOTAL SUPPLY	TOTAL EXPORTS	TOTAL DOM. CONSUMPTION	ENDING STOCKS	TOTAL DIS-TRIBUTION
CHINA, MAINLAND											
	1983	1,064	50	1,880	10	0	1,940	700	1,110	130	1,940
	1984	1,100	130	2,162	10	0	2,302	800	1,310	192	2,302
	1985	1,100	192	2,162	10	0	2,364	800	1,310	254	2,364
	1986	1,100	254	2,068	0	0	2,322	800	1,300	222	2,322

TABLE 6: DARK AIR-CURED (CIGAR) TOBACCO IN MAINLAND CHINA
SUPPLY AND DISTRIBUTION 1983-1986
(METRIC TONS)

COUNTRY	YEAR	AREA HECTARES	BEGINNING STOCKS	DRY WEIGHT PRODUCTION	TOTAL IMPORTS	U.S. LEAF IMPORTS	TOTAL SUPPLY	TOTAL EXPORTS	TOTAL DOM. CONSUMPTION	ENDING STOCKS	TOTAL DIS-TRIBUTION
CHINA, MAINLAND											
	1983	34,118	5,510	54,520	0	0	60,030	0	53,500	6,530	60,030
	1984	34,200	6,530	62,698	0	0	69,228	0	62,000	7,228	69,228
	1985	34,000	7,228	62,322	0	0	69,550	0	60,000	9,550	69,550
	1986	34,000	9,550	62,040	0	0	71,590	0	62,000	9,590	71,590

TABLE 7: DARK AIR- AND SUN-CURED TOBACCO IN MAINLAND CHINA
SUPPLY AND DISTRIBUTION 1959-1986
(METRIC TONS)

COUNTRY	YEAR	AREA HECTARES	BEGINNING STOCKS	DRY WEIGHT PRODUCTION	TOTAL IMPORTS	U.S. LEAF IMPORTS	TOTAL SUPPLY	TOTAL EXPORTS	TOTAL DOM. CONSUMPTION	ENDING STOCKS	TOTAL DIS-TRIBUTION
CHINA, MAINLAND	1959	267,098	0	0	0	0	0	0	0	0	0
	1960	268,312	0	0	0	0	0	0	0	0	0
	1961	190,206	0	0	0	0	0	0	0	0	0
	1962	206,394	0	0	0	0	0	0	0	0	0
	1963	234,723	0	0	0	0	0	0	0	0	0
	1964	234,723	0	0	0	0	0	0	0	0	0
	1965	234,723	0	0	0	0	0	0	0	0	0
	1966	234,723	0	0	0	0	0	0	0	0	0
	1967	222,177	0	0	0	0	0	0	0	0	0
	1968	199,109	0	0	0	0	0	0	0	0	0
	1969	167,948	0	0	0	0	0	0	0	0	0
	1970	152,165	0	0	0	0	0	0	0	0	0
	1971	152,165	0	0	0	0	0	0	0	0	0
	1972	141,643	0	0	0	0	0	0	0	0	0
	1973	141,643	0	0	0	0	0	0	0	0	0
	1974	145,000	0	0	0	0	0	0	0	0	0
	1975	156,000	0	0	0	0	0	0	0	0	0
	1976	160,000	0	0	0	0	0	0	0	0	0
	1977	170,000	0	0	0	0	0	0	0	0	0
	1978	85,500	0	0	0	0	0	0	0	0	0
	1979	62,000	0	0	0	0	0	0	0	0	0
	1980	57,500	0	0	0	0	0	0	0	0	0
	1981	85,500	0	0	0	0	0	0	0	0	0
	1982	118,000	0	0	0	0	0	0	0	0	0
	1983	145,711	0	148,000	0	0	148,000	0	148,000	0	148,000
	1984	134,200	0	156,000	0	0	156,000	0	156,000	0	156,000
	1985	132,000	0	148,000	0	0	148,000	0	148,000	0	148,000
	1986	132,000	0	148,000	0	0	148,000	0	148,000	0	148,000

NOVEMBER 1986
Tobacco, Cotton and Seeds Division

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TABLE 8: CIGARETTE PRODUCTION IN MAINLAND CHINA
SUPPLY AND DISTRIBUTION 1959-1986
(IN MILLIONS OF PIECES)

COUNTRY	YEAR	PRODUCTION	FILTER PRODUCTION	NON-FILTER PRODUCTION	IMPORTS	TOTAL SUPPLY	EXPORTS	DOMESTIC CONSUMPTION	TOTAL DISTRIBUTION
CHINA, MAINLAND	1959	428,000	0	0	0	428,000	0	428,000	428,000
	1960	445,000	0	0	0	445,000	0	445,000	445,000
	1961	461,000	0	0	0	461,000	0	461,000	461,000
	1962	476,000	0	0	0	476,000	0	476,000	476,000
	1963	493,000	0	0	0	493,000	0	493,000	493,000
	1964	509,000	0	0	0	509,000	0	509,000	509,000
	1965	525,000	0	0	0	525,000	0	525,000	525,000
	1966	542,000	0	0	0	542,000	0	542,000	542,000
	1967	557,000	0	0	0	557,000	0	557,000	557,000
	1968	574,000	0	0	0	574,000	0	574,000	574,000
	1969	575,000	0	0	0	575,000	0	575,000	575,000
	1970	575,000	0	0	0	575,000	0	575,000	575,000
	1971	575,000	0	0	0	575,000	0	575,000	575,000
	1972	575,000	0	0	0	575,000	0	575,000	575,000
	1973	575,000	0	0	0	575,000	0	575,000	575,000
	1974	575,000	0	0	0	575,000	0	575,000	575,000
	1975	575,000	0	0	0	575,000	0	575,000	575,000
	1976	575,000	0	0	0	575,000	0	575,000	575,000
	1977	576,000	0	0	0	576,000	0	576,000	576,000
	1978	591,000	0	0	0	591,000	0	591,000	591,000
	1979	651,000	0	0	0	651,000	0	651,000	651,000
	1980	760,000	0	0	0	760,000	0	760,000	760,000
	1981	866,000	0	0	0	866,000	0	866,000	866,000
	1982	942,500	84,800	857,700	0	942,500	0	942,500	942,500
	1983	968,800	95,800	873,000	0	968,800	0	968,800	968,800
	1984	1,062,500	115,000	947,500	0	1,062,500	0	1,062,500	1,062,500
	1985	1,178,000	145,000	1,033,000	0	1,178,000	0	1,178,000	1,178,000
	1986	1,270,000	160,000	1,110,000	0	1,270,000	0	1,270,000	1,270,000

NOVEMBER 1986
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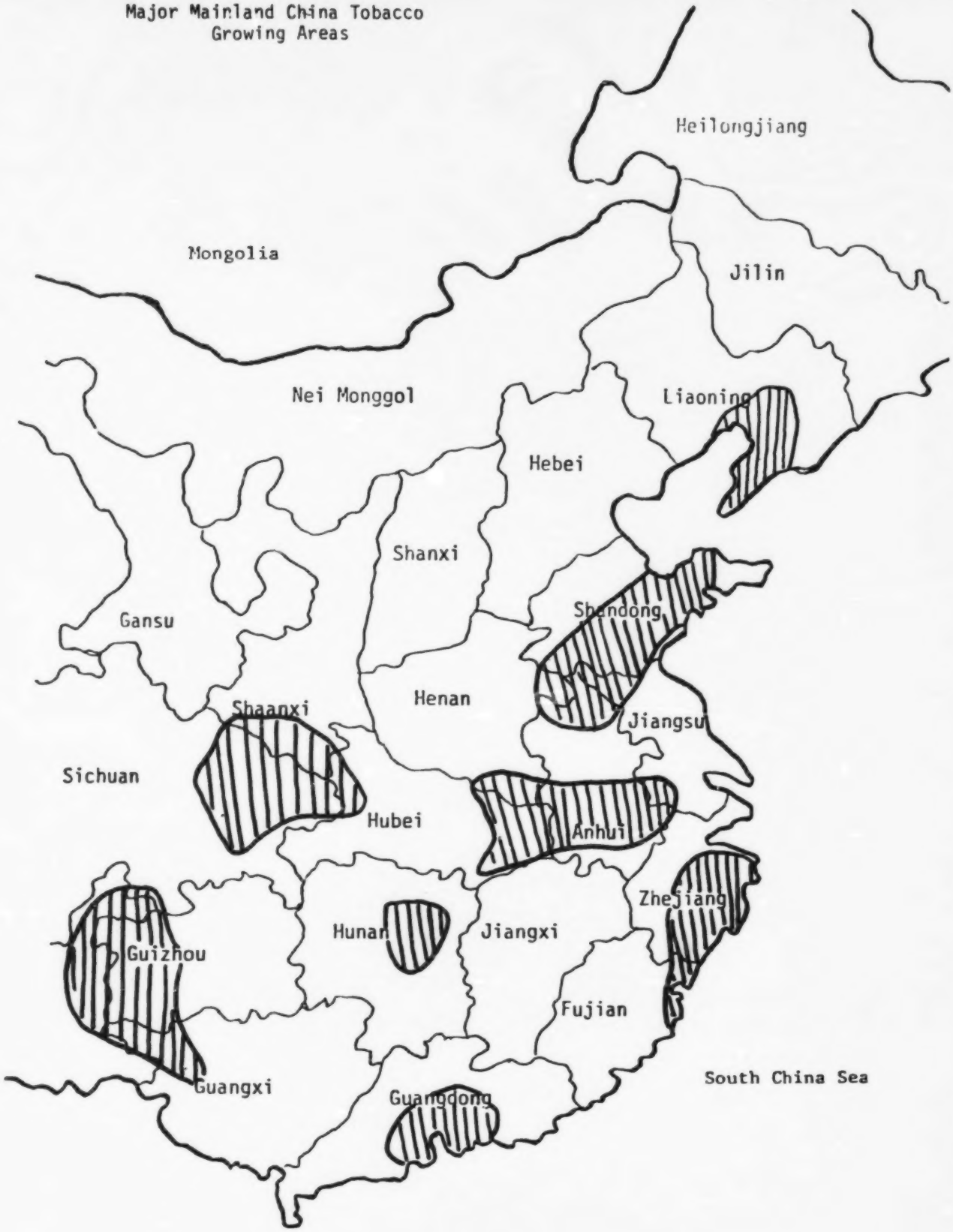
Commodity Programs, FAS, USDA

Major Mainland China Tobacco Growing Areas



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